

Growing Gloucester's Visitor Economy



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1. Executive Summary

Gloucester is a City which has a rich history with a wealth of legacy from that history, both culturally and physically with its many heritage assets. It is a City that has recently benefited from over £720¹ million of investment in regeneration and with more significant investment in regeneration planned focusing on growth and improvement of amenities and lifestyle for businesses, residents and visitors.

The visitor economy is an important part of the economic mix for the City of Gloucester and has grown at a faster rate than total economic activity for the area². It is projected that this growth in the visitor economy is likely to continue, substantially outperforming whole economy growth for the area³. If these projections are proven to be correct then the visitor economy is likely to become an even more important part of the local economy.

This report sets out a draft strategic plan for driving growth in the value of Gloucester's visitor economy. Some of the actions set out in this plan can be achieved by those organisations in the city with the remit to promote tourism, others will require more wide ranging stakeholder support. This is a consultation document and the authors warmly welcome feedback and additional ideas on how to continue growing the visitor economy to assist in making Gloucester the best small city in Britain⁴

Key Conclusions:

- Gloucester has consistently outperformed both national and regional growth rates in visitor spend. Economic benefits from exploiting the visitor economy will become an ever more important component of the whole economy locally within the next 10 year period.
- There is a need to continue the progress towards closer coordination between organisations whose activity contributes to visitor economy growth
- Current successful efforts to promote the city must be amplified to capitalise on current growth and increase it bringing substantial growth in jobs and the local economy
- Barriers to growth in the visitor economy such as shortage of good quality hotel rooms and lack of a larger venue space need to be addressed

¹ GHURC

² GVA of tourism related industries by rural-urban LA classification region and local authority. Source ONS, Annual Business Survey 2000-2010 abs@ons.gov.uk

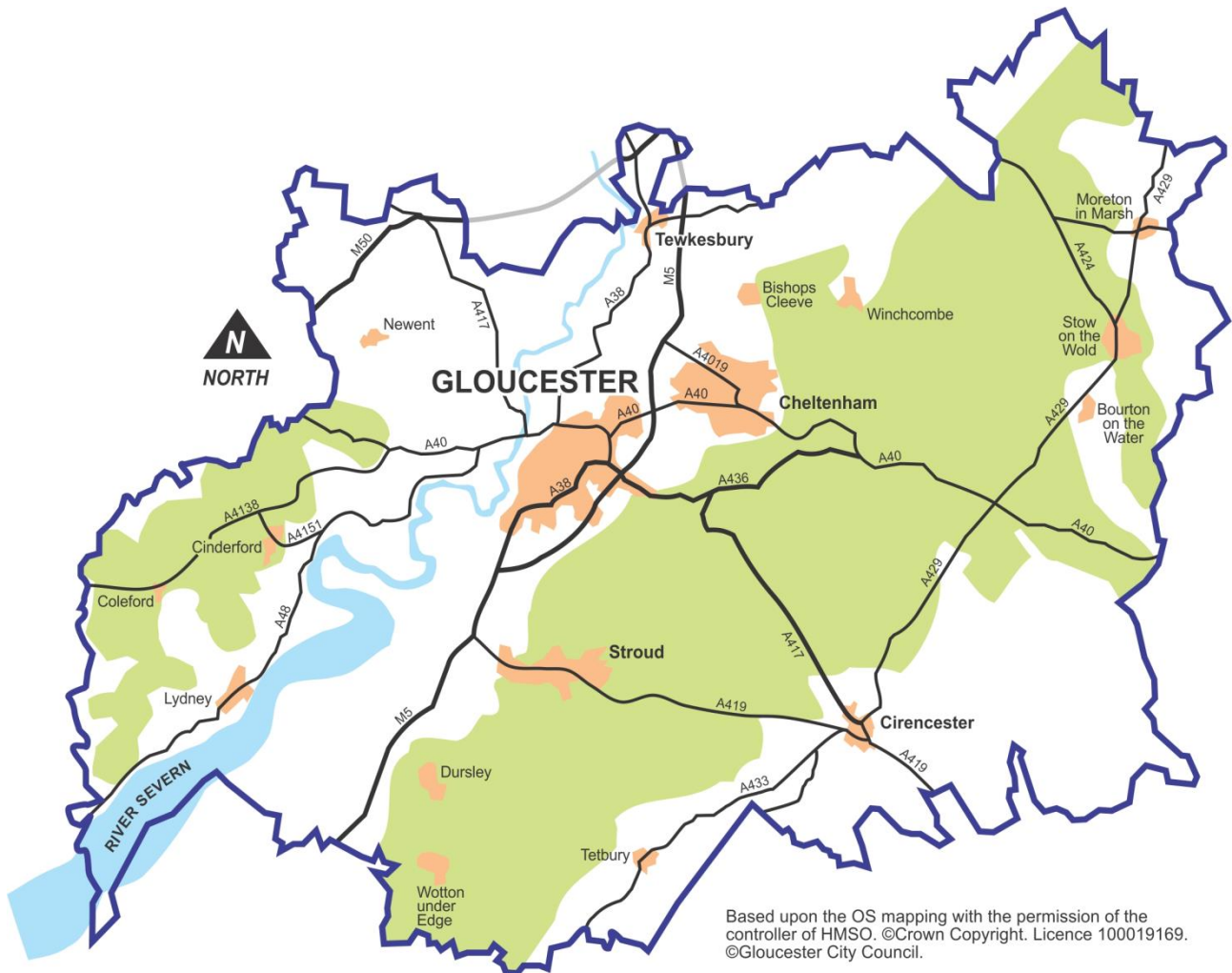
³ DCMS Government Tourist Policy projects total UK Tourism spend to grow at annualised rate of 3.5percent per annum to 2020, GFirst LEP in draft Strategic Economic Plan projects a regional growth rate of 2percent per annum to 2025

⁴<https://www.google.co.uk/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&cad=rja&uact=8&ved=0CC4QFjAA&url=http%3Apercent2Fpercent2Frichardgraham.orgpercent2Fwp-contentpercent2Fuploadspercent2F2013percent2F01percent2F2014-Making-Gloucester-the-Best-Small-City-In-Britain.pdf&ei=xzQoU4LmBsi90QWd2IH4AQ&usg=AFQjCNFDNaU0dwfmj0M0Z88fKV7E65ERhA&sig2=nAXJpPXsP2tYRyDkNC10kw&bvm=bv.62922401,d.d2k>

2. Background

2.1 Geography

A Cathedral city, district and county town of Gloucestershire in the South West region of England. Gloucester lies close to the Welsh border, and on the River Severn, approximately 32 miles (51 km) north-east of Bristol, and 45 miles (72 km) south-southwest of Birmingham. The city is centrally located between the Cotswolds and The Forest of Dean



2.2 Demographics

Gloucester has a relatively young,⁵ growing population, being the ninth fastest growing city in the UK with 1.1percent annual growth (2010 population = 123,400; 2002 pop = 110,600 a12,800

⁵ Gloucester Prospectus, Gloucester City Council pp 14 states 39 percent of City population are under 30, 25percent under 20 the highest in South West

increase)⁶ it also has wide cultural diversity with a reported 60 languages spoken as mother tongue in the City⁷

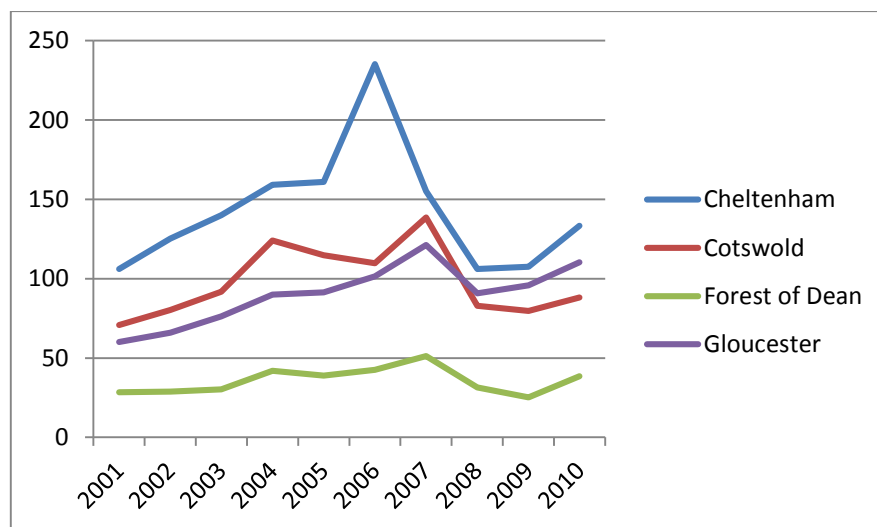
2.3 Visitor Economy

According to GFirst LEP Gloucestershire wide productivity will increase at an annual average growth rate of 2 percent leading to a £14.5 billion economy in 2025 (from £11.5 billion in 2007) a growth of £3 billion in 18 years⁸

Visit England have projected that during the same period the Visitor Economy will grow nationally by an annualised 5 percent⁹. In Gloucestershire this would generate an additional economic activity derived from this sector rising from £728 million in 2010 to £1.5 billion by 2025 potentially generating 14,300 new jobs (DCMS Government Tourist Policy 2011¹⁰ quotes a more conservative annualised 3.5 percent growth rate to 2020)

- Using the same 5 percent growth projections GVA generated by tourism in the City of Gloucester is projected to grow from **£110.4 million** to **£229.5 million** per annum.
- It is important to note that from 2002-2010 GVA growth rates of tourism related industries in Gloucester averaged at **7.9 percent per annum**.
- **Figures released by Office National Statistics June 2014 show that in 2013 there was a 38% increase in international visitors to Gloucester**

Chart showing growth in visitor economy across Gloucestershire



⁶ http://www.centreforcities.org/assets/files/2014/Cities_Outlook_2014.pdf

⁷ <http://www.gloucestercitizen.co.uk/Barton-cultural-hub/story-11893611-detail/story.html>

⁸ <http://www.gfirstlep.com/Home/Strategic-Economic-Plan/>

⁹ Visit England Visitor Economy Briefing for Local Enterprise partnerships – Issue 4 August 2013

http://www.visitengland.org/Images/130905percent20LEPpercent20Visitorpercent20Economypercent20Briefingpercent20Issuepercent204_tcm30-38506.pdf

¹⁰ <https://www.gov.uk/government/publications/tourism-strategy>

GVA of tourism related industries¹ by rural - urban LA classification, region and local authority¹¹

Source: ONS, Annual Business Survey, data available on request: abs@ons.gov.uk¹²

2010

Coverage: England

GVA Millions

Cheltenham	133.2
Cotswold	88.2
Forest of Dean	38.5
Gloucester	110.4
Stroud	? ¹³
Tewkesbury	52.7

In 2013, the direct industry effect generated around £58 billion of GVA or about 4.1 percent of (expected) UK GDP. Combined with the ‘tourism industry’ effect the contribution was just under £127 billion in GVA, or 9.0 percent of UK GDP. In total, including all direct, indirect, and induced effects, the contribution to the UK economy was £161 billion or **11.4 percent of UK GDP**.¹⁴

percent Growth in Visitor economy GVA	2002	2003	2004	2005	2006	2007	2008	2009	2010	Average percent growth per annum
South Gloucestershire	3.9	9.4	9.1	23.5	-1.3	-18	29.3	-18.4	-7.6	3.3
Cheltenham	18.1	11.7	13.7	1.2	46.1	-34.1	-31.6	1.3	24	5.6
Cotswold	13.6	14.2	35.2	-7.5	-4.3	26.3	-40.2	-3.8	10.6	4.9
Forest of Dean	1.1	4.9	39.1	-7.5	9.3	20.5	-38.7	-19.6	52.7	6.9
Gloucester	9.7	15.9	17.9	1.6	11.2	19.5	-25.2	5.6	15.3	7.9
Stroud	3.5	19.7	32	10.7	-3.9	53.6	-41.5	-20.8	? ¹⁵	4.0
Tewkesbury	14.9	5.6	20.6	12.3	0.6	25.5	-32.6	-24	10.2	3.7

¹¹ GVA is the value of the sector’s output minus inputs bought from other sectors and taxes and subsidies
<http://www.ons.gov.uk/ons/guide-method/method-quality/specific/economy/national-accounts/gva/index.html>

¹² <https://www.gov.uk/government/statistical-data-sets/rural-statistics-local-level-data-on-tourism-gva>

¹³ potentially anomalous figure removed

¹⁴ Excerpts from DCMS Government Tourist Policy 2011

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/78416/Government2_Tourism_Policy_2011.pdf

¹⁵ potentially anomalous figure removed

Conclusion

- The Value of the visitor economy in Gloucester has grown by an average of 7.9% per annum from 2002 to 2010 and that growth appears to be continuing
- Gloucester has consistently outperformed both national and regional growth rates in visitor spend.

General whole economy growth in the area has been and is projected to be at a slower rate than growth projected in the visitor economy therefore indicating that **economic benefits from exploiting the visitor economy will become an ever more important component of the whole economy locally within the next 10 year period**. Realising this importance it is necessary to develop and implement an effective coordinated strategy for the visitor economy, recognising the strengths and weaknesses of the City and environs, seeking to address those weaknesses and communicating locally, regionally, nationally and internationally to promote Gloucester as an appealing destination to visit. This will without doubt have knock on effects in improving the perception of Gloucester as a desirable place to live and do business.

3. Product Audit – *What's the offer?*

Rich in history and heritage, Gloucester has a wealth of architectural gems, numerous popular visitor attractions, a Premiership Rugby team and is located on the edge of The Cotswolds, an Area of Outstanding Natural Beauty.

As The Cathedral City of The Cotswolds, Gloucester is part of The Cotswolds Tourism Partnership. The Cotswolds is one of the Visit England 'Attract' brands reflecting the area's appeal to international visitors.

3.1 Heritage and culture

Gloucester's skyline is dominated by the Cathedral which represents the finest example of Perpendicular Gothic architecture in the world. It is also notable for its rich historical connections as it was the location where Henry III was crowned, Edward II was buried and is where William the Conqueror ordered the writing of the Domesday Book. It has been used many times as a filming location for TV and films including Harry Potter.

Gloucester has many historical literary and musical connections. John Stafford Smith who composed the American National Anthem was born in Gloucester. Robert Raikes, the founder of the Sunday School Movement is buried in St Mary de Crypt Church which is also where George Whitefield, the famous 18th century preacher influential on the Methodist movement delivered his first sermon. A visit to Gloucester provided the inspiration for Beatrix Potter to write and illustrate her book, *The Tailor of Gloucester*. In the 19th century, Charles Dickens based his character Ebenezer Scrooge on a wealthy local banker Jemmy Wood known as *The Gloucester Miser*. The English composer and poet, Ivor Gurney, was also born in Gloucester in 1890 and both W.E. Henley author of the famous poem "Invictus" and Hubert Parry composer of the anthem "Jerusalem" are both from the city.

Gloucester has a proud military history and the Soldiers of Gloucestershire Museum tells the story of The Gloucestershire Regiment (The Glosters) and The Royal Gloucestershire Hussars. Nature in Art has been one of 6 finalists in 2013 Family Friendly Museum of the Year awards and twice specially commended in the National Heritage Museum of the Year Awards and attracts many international exhibitions each year. Rugby is a professional rugby union club which competes in the top flight of English rugby – the Aviva Premiership, as well as the Anglo-Welsh LV=Cup and the European Rugby Cup competitions. With a loyal fan base, match attendance in the 2012-13 season was 225,000 people. Gloucester will be a Host City for the Rugby World Cup in 2015 with Kingsholm hosting 4 matches and six international teams in the Tournament.

Engineering and aviation in particular are important to Gloucester. Britain's first jet plane, the Gloster E28/39, powered by Sir Frank Whittle's revolutionary jet engine, first left the ground in 1941 from the Gloster factory airfield near Gloucester. Today many local people are employed in companies supplying the aerospace industry and the Jet Age Museum aims to recreate the excitement of aviation in a bygone era.

Gloucester has a growing reputation for festivals and events. The Tall Ships Festival in May 2013 which is organised by Marketing Gloucester, attracted over 120,000 visitors to the city and received regional TV and media coverage. The Heritage Open Days in Gloucester, which are promoted in conjunction with Gloucester History Festival, are the largest in the region and one of the top 3 heritage events nationally¹⁶. The annual Christmas Lantern Procession is a unique event in the area and involves local schools whilst other events, such as Residents' Weekend, the BiG Eat Week and the Rhythm & Blues Festival, rely heavily on the commitment of local businesses. In addition, Gloucester Quays organise an annual programme of events including a Food Festival in July which attracts around 90,000 visitors and a Victorian Christmas Market which attracted 150,000 visitors in November 2013.

The ancient tradition of Cheese Rolling at Cooper's Hill on the Spring Bank Holiday has been taking place for hundreds of years and has attracted worldwide media interest. Other local traditions include surfing the Severn Bore, and since the Middle Ages the people of Gloucester have sent a Lamprey Pie, made from the locally-sourced eel-like fish to the Royal household every Jubilee and Coronation. Other local delicacies include Gloucester Old Spot sausages double Gloucester Cheese, single Gloucester Cheese (an EU PDO) and Elvers.

3.2 Landscape and countryside

Gloucester is the administrative centre of Gloucestershire and is situated on the edge of the Cotswolds. It is the most inland port in Britain with the River Severn and the Gloucester-Sharpness Canal both adjacent to the city. After extensive regeneration, the Historic Docks have been restored to their former glory and provide an attractive environment for tourists to stroll around. The Gloucester Waterways Museum in the Docks tells the story of the country's canals and rivers and operates boat trips for visitors. Numerous canal boats are moored in Victoria Basin and the boat builder, T.Nielsen, is based in Docks alongside the Main Basin.

Alney Island is an island in the River Severn near Gloucester which was designated as a special nature site in 1993. The area is prone to flooding at high tides.

The Severn Bore is a spectacular natural phenomenon which creates a surge wave along the Severn estuary at different times throughout the year. Large bores attract crowds of onlookers and surfers who attempt to ride the wave.

¹⁶ Information from Heritage Open Days

Gloucester is close to The Royal Forest of Dean: a former royal hunting forest where several tourist attractions are now based including Dean Heritage Centre, Clearwell Caves, Go Ape, Puzzlewood, Wildfowl and Wetlands Trust and Pedalabikeaway. Robinswood Hill is a hill and country park to the south of the city centre managed by the Countryside Unit. Gloucestershire Wildlife Trust has its head office based there. It was originally one of the main sources of water to the city where the springs were previously used by Gloucester's St Peter's Abbey in the 13th century. The 100 acre site is now home to much wildlife with spectacular views of The Cotswolds, Malvern Hills and May Hill.

3.3 Built Environment

The historic city centre features four 'Gate' Streets which converge at The Cross. With many tall buildings dating back to Tudor times, particularly in Westgate Street, the area has an historic charm although the retail units have a corresponding tendency to be small.

Besides the historic architectural gems, some ugly buildings were erected in the 1960s which detract from the charm of the historic centre. Over £720 million has been spent on the regeneration of Gloucester over the past decade with ongoing plans for some of these unsightly buildings to be demolished or clad. The planned redevelopment of King's Square will make a significant difference to the aesthetic appeal of the city centre.

The Historic Docks have undergone a dramatic transformation over the past couple of decades and now provide an attractive Leisure Quarter. With easy access to shops, museums, cafes and restaurants, the area has become a popular destination for coach parties.

3.4 Access and Transport

Gloucester is well located with easy access to The Midlands, the South West and South Wales via the adjacent M5 Motorway. The city is just over 2 hours from London and is signposted from junction 15 of the M4.

Gloucester Railway Station is located close to the city centre. Regular train services operate to Bristol and the South West, London Paddington, South Wales and to Birmingham New Street. Gloucester Bus Station is centrally located and is served by National Express, Stagecoach and other coach and bus companies. Gloucestershire Airport at Staverton offers scheduled flights to the Isle of Man, Belfast and Jersey with Citywing. Gloucester Docks provide excellent access and mooring for leisure boats

3.5 Visitor Services

The award-winning Gloucester Tourist Information Centre provides visitors with details of accommodation, restaurants, tourist attractions and things to do in the local area. Services offered include accommodation bookings, coach, bus and short break bookings, tickets for local events and souvenirs.

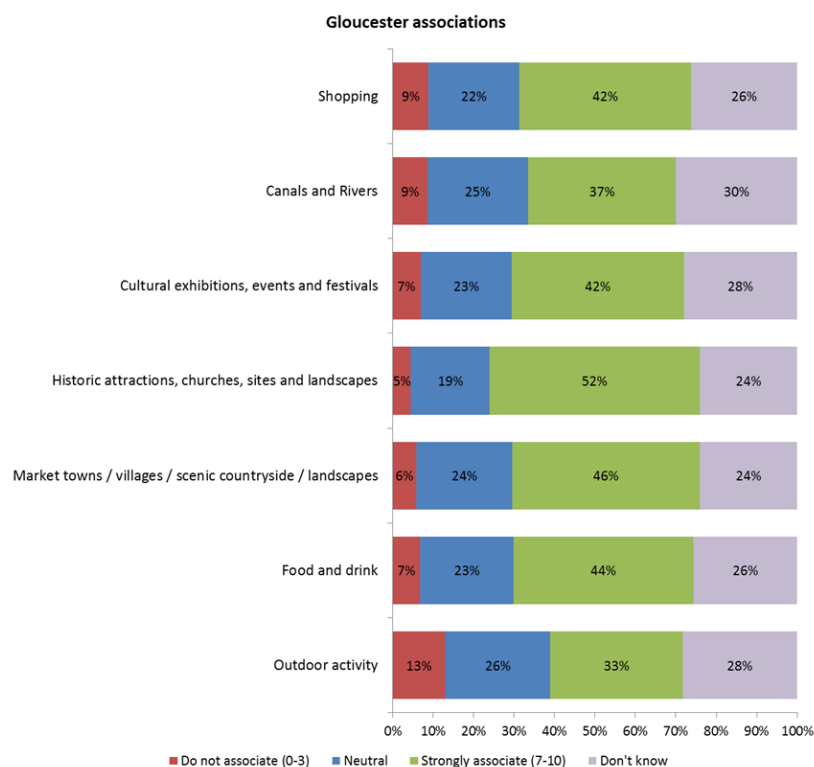
A free Gloucester Visitor Guide is available in the Tourist Information Centre featuring information, accommodation and event listings and a map showing key locations including car parks, public toilets and the community toilet scheme. Green Tourism information is also provided. Visitor information can also be accessed via official destination website www.thecityofgloucester.co.uk and social media including Twitter @visitgloucester , Facebook www.facebook.com/Gloucester

A series of foreign language leaflets is available which need to be updated ahead of the Rugby World Cup in 2015 and the anticipated influx of overseas visitors.

There is also an Accessibility Leaflet and a new Heritage Walking Tours app which was launched in the summer of 2014. Google have chosen Gloucester as the second destination in the world to partner in development of content for their “Fieldtrip” tour app for mobile and Google Glass this is being partnered by Marketing Gloucester and has recently gone live.

A new ‘Meet and Greet’ service for coaches has recently been introduced by Gloucester City Council which is being co-ordinated by Gloucester Tourist Information Centre. Currently Gloucester Quays outlet also provide a meet and greet services for coaches and have a customer service desk which provides a limited amount of tourist information

3.6 The following chart shows what current visitors to Gloucester most associate with the city



- As is shown by the above chart ¹⁷Gloucester is most strongly associated with Historic attractions, churches, sites and landscapes

¹⁷ (Arkenford, January 2012)

4. SWOT

Wherever possible the information in this SWOT analysis is based on empirical data. Sources referenced^{18, 19}.

4.1 Strengths

- i. Some fine buildings including many which represent unique or exceptionally well preserved examples of the kind. Over 500 listed buildings within the city²⁰
- ii. Rich History (highest rated for History and Heritage in Cotswolds) (Arkenford, January 2012) 3rd largest Heritage Open Days event in the country, over 2,000 years of continuous history
- iii. World Class Cathedral
- iv. Established and successful rugby team promotes the name of Gloucester throughout the UK and Europe
- v. Regenerated Historic Docks, best preserved 18th century inland port in the country
- vi. Gloucester Quays
- vii. Proximity to Cotswolds and Forest of Dean
- viii. Good Transport Links - Road network access (M4, M5) allows access to most parts of the UK within a two hour journey
- ix. Active events programme and strongest reputation in the region as a centre for Heritage events (Arkenford, January 2012) (Visit England, 2011-2012) several events attract over 100,000 visitors. Events include:
 - a. Tall Ships
 - b. Blues Festival
 - c. Three Choirs
 - d. Victorian Christmas Market
 - e. Food Festival
 - f. Crucible Exhibition
- x. Currently along with Cheltenham, Gloucester is a top destination in the Cotswolds (Arkenford, January 2012)
- xi. Local younger people 15-44 consider Gloucester to be a good place for a day trip (Arkenford, January 2012)
- xii. In the 24-35 age bracket Gloucester out performs Cheltenham for local day visitors (Arkenford, January 2012)

¹⁸ References from Visit England's, The Cotswolds Perception and Awareness Research, January 2012 Arkenford copies available from Marketing Gloucester are marked (Arkenford, January 2012)

¹⁹ (Visit England, 2011-2012)

²⁰ <http://www.britishlistedbuildings.co.uk/england/gloucestershire/gloucester> see also <http://www.gloucester.gov.uk/resident/Documents/Planningpercent20andpercent20Buildingpercent20Control/HistoricEnvironment/Schedulepercent20ofpercent20Listedpercent20Buildingspercent20bypercent20alphabeticalpercent20roadpercent20name.pdf>

- xiii. Day visitor volume from elsewhere (not local) in the 65+ bracket outperforms all other areas and conurbations across Cotswolds and Forest of Dean (Arkenford, January 2012)
- xiv. Gloucester is very attractive with “Cosmopolitans²¹” (Arkenford, January 2012)
- xv. Gloucester is perceived as being relaxed, cultural and nostalgic (Arkenford, January 2012)
- xvi. Strong community in the city
- xvii. Industry - strong in many sectors including engineering, aerospace, IT (2nd Geekiest IT literate city in the UK - Ebuyer)Business tourism
- xviii. Film location
- xix. Award-winning Tourist Information Centre
- xx. Active Civic Trust
- xxi. Pedestrianised historic Gate Streets
- xxii. The Potters (Beatrix, Harry)
- xxiii. Gloucester ranks fourth in the country for life satisfaction (source: The Centre for Cities 2014 report)
- xxiv. New vibrant restaurant/Bar quarter at Gloucester Docks and Quays with over twenty outlets

4.2 Weaknesses

- i. Unattractive “gateways” into the city
- ii. Inconsistent city branding
- iii. Inconsistent and inadequate messaging to target audiences
- iv. Inconsistent quality of architecture through the city and environs including:
 - a. Bus station
 - b. Eastgate Street
 - c. Barbican/Blackfriars car park area
- v. Evening economy is underdeveloped with a small number of independent restaurants in the historic city centre, leading to a lack of vibrancy in the evenings apart from at the time of festivals and rugby matches
- vi. Perception that there are a lack of quality places to eat
- vii. Lack of upper end restaurants
- viii. Perception of Gloucester as an unsafe city²³
- ix. Improved connection needed between Gloucester Quays/docks and Historic City Centre (also see opportunities)
- x. Poor awareness of the City and its offerings amongst visitors to The Cotswolds, only 24 percent of visitors aware of proximity (Arkenford, January 2012)
- xi. Poor awareness of destination compared to top tier destinations such as York, Stratford and Bath. 42 percent of people questioned have heard of Gloucester but have no idea

²¹ Cotswolds Tourism Marketing Strategy 2013-2016

²³ <http://www.ukcrimestats.com/Constituencies/> shows the constituency of Gloucester to have the 26th highest crime rate out of 573 constituencies in the UK

what it is like for comparison York 24 percent, Warwick 37 percent, Cheltenham 39 percent (Arkenford, January 2012)

- xii. Empty Shops particularly Westgate/Northgate (former M&S)
- xiii. Poor presentation and usage of river frontage along A4301
- xiv. Other Empty underutilised and sometimes dilapidated buildings including
 - a. Prison
 - b. The Fleece Inn
- xv. Lack of consistent high quality city dressing – flowers, flags etc. leading to the city not being seen at its best
- xvi. Historic lack of coordination of visitor orientated activity
- xvii. Lack of visitor accommodation. Capacity and quality issues
- xviii. Limited conference facilities to host large events
- xix. The City's many cultural assets are undervalued by some locals with a perceived need to improve civic pride from some residents
- xx. Some of the city centre is unloved or cared for piecemeal
- xxi. Lack of coordination with projects, and groups working on good things in the city
- xxii. Perceived rivalry between Quays and City Centre - they are still seen by many as being divided rather than as a whole and need to be promoted jointly
- xxiii. Rail network – not being on the main line meaning that many cross country routes bypass Gloucester
- xxiv. Proliferation of chuggers put off shoppers

4.3 Opportunities

- i. Being a host city for Rugby World Cup 2015 gives a massive opportunity to raise the profile of the city
- ii. Significant current investment has shown growth in retail and night time economy in Gloucester Quays/Docks and provided a great environment for visitors and proven that there is a potential market for more of these establishments
- iii. Changes in the Cotswold Tourism Body could allow Gloucester to raise its profile with the high number of visitors to the Cotswolds who as yet do not include Gloucester on their itinerary
- iv. New arrangements for City delivered events and closer coordination that is being developed should lead to better timing, delivery and promotion
- v. Project Pilgrim will improve the physical aspect of part of the city and give good PR opportunities and an attractive event space in the city centre - outside the Cathedral. See Winchester Xmas markets/ice rink
- vi. Increasing staying visitors
- vii. Expansion of current key events following the Cheltenham Festivals model to encourage residents and tourists to the city
- viii. Regeneration gives opportunities to address wider regional weaknesses in developing offerings attractive to visitor economy – this includes conference facilities

- ix. Lack of connection between Gloucester Quays/docks and Historic City Centre can be improved by as yet undeveloped assets e.g. Southgate Carpark
- x. Greyfriars residential development - increase demand for services, retail and leisure in the city centre
- xi. Characters such as Aethelflaed (died 918) - daughter of Alfred the Great have enormous tourism and PR appeal (see Richard of York in Leicester). Gloucester is a city rich with connections to such characters and there are opportunities to utilise these to promote tourism and create attractions or festivals. Other anniversaries include those of Henry III and Civil war
- xii. Gloucester is a successful area for internationally trading businesses, development of additional hotel and conference facilities will lead to these spending money in the city
- xiii. Film location
- xiv. Heritage Lottery funded projects – Llanthony Priory, St Mary de Crypt, City Museum refurb, Soldiers of Gloucestershire refurbishment, Waterways museum
- xv. Southgate Street Townscape Heritage Initiative.
- xvi. Anniversaries – 300th of George Whitfield, 400th of Henry III in 2016, 375 for Siege of Gloucester in 2018, 1100 for Aethelfaed in 2018.

4.4 Threats

- i. If there are significant delays on delivery of King's Quarter development this will have detrimental effects on reaping the benefits such improvement would make.
- ii. If Gloucester is not equitably represented in Cotswolds DMO promotions or Cotswolds DMO becomes Oxford/Banbury focussed
- iii. If Gloucester does not receive funding assigned to New Cotswolds DMO and suffer from underinvestment in tourism compared to other areas
- iv. Cuts at large employers could affect the retail sector
- v. Continued rent inertia from landlords and agents to find appropriate and distinctive retail tenants on the gate streets
- vi. Vulnerability to flooding could create a negative image
- vii. Cheltenham's and Bristol's (Cribbs Causeway and Cabot's Circus) retail offering competing with Gloucester's offering
- viii. Events programme of Cheltenham competing for visitors with Gloucester
- ix. If Stanhope do not proceed with investment plans
- x. Cost of parking in city centre in the evening a potential cap on evening economy (now partly addressed by revised free parking after 5.00 pm in two city centre car parks

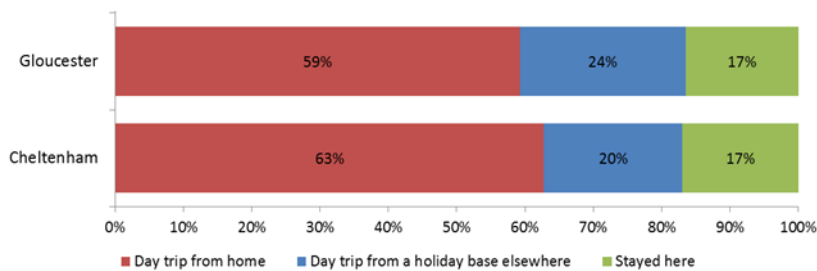
5. What/who is our market and who should we target?

5.1 Visitors to Gloucester can be categorised in the following ways:

- Local Day Visitors
- Other Day Visitors
- Staying Visitors

The other day visitors and staying visitors can then be further subdivided into Domestic and International visitors and further analysis can then be made of the purpose for the visit: sport, business, leisure and so-on and more precise analysis of where the visitors come from. Some of the pertinent figures with commentary are highlighted below.

The following diagram²⁴ shows an interesting comparison between Gloucester and Cheltenham.



5.2 Whilst the total number of visitors to Cheltenham is historically higher than those to Gloucester the following points are interesting to note:

- Gloucester attracted proportionally **less** day visitors from home than Cheltenham
- Gloucester attracted proportionally **more** day visitors who are staying on a holiday elsewhere than Cheltenham. In real terms this means visitor GVA for this group is the same for both ²⁵
- Proportionally Gloucester staying visitors were similar to Cheltenham

5.3 Assuming the above proportions to hold true for future projections and assuming a continued growth in the local visitor economy at historical levels we could conclude that:

²⁴ (Arkenford, January 2012)

²⁵ Gloucester £26.5 million (24percent of £110.4 million tourism GVA), Cheltenham £26.6 million (20percent of £133.2 million tourism GVA) ONS 2010 GVA from Tourism <https://www.gov.uk/government/statistical-data-sets/rural-statistics-local-level-data-on-tourism-gva>

- Gloucester could very rapidly become the number one destination in the Cotswolds for day trips from a holiday elsewhere
- There will be pressure on current Hotels with insufficient rooms being provided by current operators and a requirement to fill demand at present occupancy rates of another 2000 rooms by 2030






5.5 Below extracted from Value of Tourism 2010 Gloucestershire South West Tourism Alliance

Diagram 5.6

All figures relating to City of Gloucester

Key Facts	
243,500	Staying visitor trips
800,000	Staying visitor nights
£34,769,000	Staying visitor spend
1,690,000	Day visits
£83,167,000	Day visitor spend
£117,936,000	Direct visitor spend
£7,852,000	Other related spend
£125,788,000	TOTAL VISITOR RELATED SPEND
2,933	Estimated actual employment
2,161	FTE employment
5%	Proportion of all employment

Diagram 5.7

	Accommodation • UK staying visitors £9,414,000 • Overseas staying visitors £2,777,000
	Shopping • UK staying visitors £3,024,000 • Overseas staying visitors £2,561,000 • Day visitors £35,533,000
	Food & drink • UK staying visitors £5,825,000 • Overseas staying visitors £1,908,000 • Day visitors £31,260,000
	Attractions/entertainment • UK staying visitors £2,531,000 • Overseas staying visitors £1,154,000 • Day visitors £8,354,000
	Travel • UK staying visitors £4,721,000 • Overseas staying visitors £854,000 • Day visitors £8,020,000

6. Requirement for additional 1800 Hotel Rooms

It is a truism that if demand increases at the same pace as supply then occupancy rates will remain the same. A 2006 study²⁶ for Exeter City Council identified that future growth would lead to the need for a large number of hotels. With the backing of this report investors were successfully sought and through the building of new hotels the number of bedrooms in the area was increased from 1200²⁷ in 2006 to 3000 in 2014 with minimal effects on occupancy rate.

Currently today – like Exeter in 2006 - Gloucester has approximately 1200 Hotel rooms and in 2010 Gloucester achieved 800,000²⁸ staying visitor nights across its major hotels²⁹. As we have seen historically even taking into account the years of recession Gloucester has averaged a 7.9% growth rate in the visitor economy³⁰ Visit England have projected that during the period to 2025 the Visitor Economy will grow nationally by an annualised 5 percent³¹. DCMS Government Tourist Policy 2011³² quotes a more conservative annualised 3.5 percent growth rate to 2020. If we are to assume that these growth rates are directly reflected in the demand for additional hotel rooms in Gloucester we can project the following:

Sensitivity analysis of required rooms in Gloucester organic growth

Growth Rate	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
3.50%	1200	1242	1285	1330	1377	1425	1475	1527	1580	1635	1693	1752	1813
5%	1200	1260	1323	1389	1459	1532	1608	1689	1773	1862	1955	2052	2155
7.90%	1200	1295	1397	1507	1627	1755	1894	2043	2205	2379	2567	2770	2988

Given that the historical annual growth, which includes the negative growth in 2008 has shown to be 7.9% (12% when 2008 anomaly removed) we conclude that a lack of new hotel development could be barrier to growth in the visitor economy. Interestingly the Joint Core Strategy hotel capacity study (May 2009) stated that “detailed analysis suggests that the additional further supply should be in the Full Service sector (either 3 or 4 Star)”

²⁶ https://www.dropbox.com/s/pfl47biwnjq9q8k/Exeter_Hotel_Study_-_Final_Report.pdf

²⁷ Paragraph 3.3 https://www.dropbox.com/s/pfl47biwnjq9q8k/Exeter_Hotel_Study_-_Final_Report.pdf

²⁸ Value of tourism 2010 Gloucestershire South West Tourism Alliance

²⁹ As defined by JCS Hotel Study

<https://www.dropbox.com/s/u0ho2gdbg1pkq2f/JCSHotelStudyFinalMainDocument.pdf>

³⁰ ONS figures <https://www.gov.uk/government/statistical-data-sets/rural-statistics-local-level-data-on-tourism-gva>

³¹ Visit England Visitor Economy Briefing for Local Enterprise partnerships – Issue 4 August 2013

http://www.visitengland.org/Images/130905percent20LEPpercent20Visitorpercent20Economypercent20Briefingpercent20Issuepercent204_tcm30-38506.pdf

³² <https://www.gov.uk/government/publications/tourism-strategy>

7. Different Approaches to Different Markets

7.1 As has been shown, visitors to Gloucester come for a number of reasons:

- Heritage
- Shopping
- Sport and Leisure, including cultural events
- Business

7.2 We can draw the following conclusions about visitors to the city:

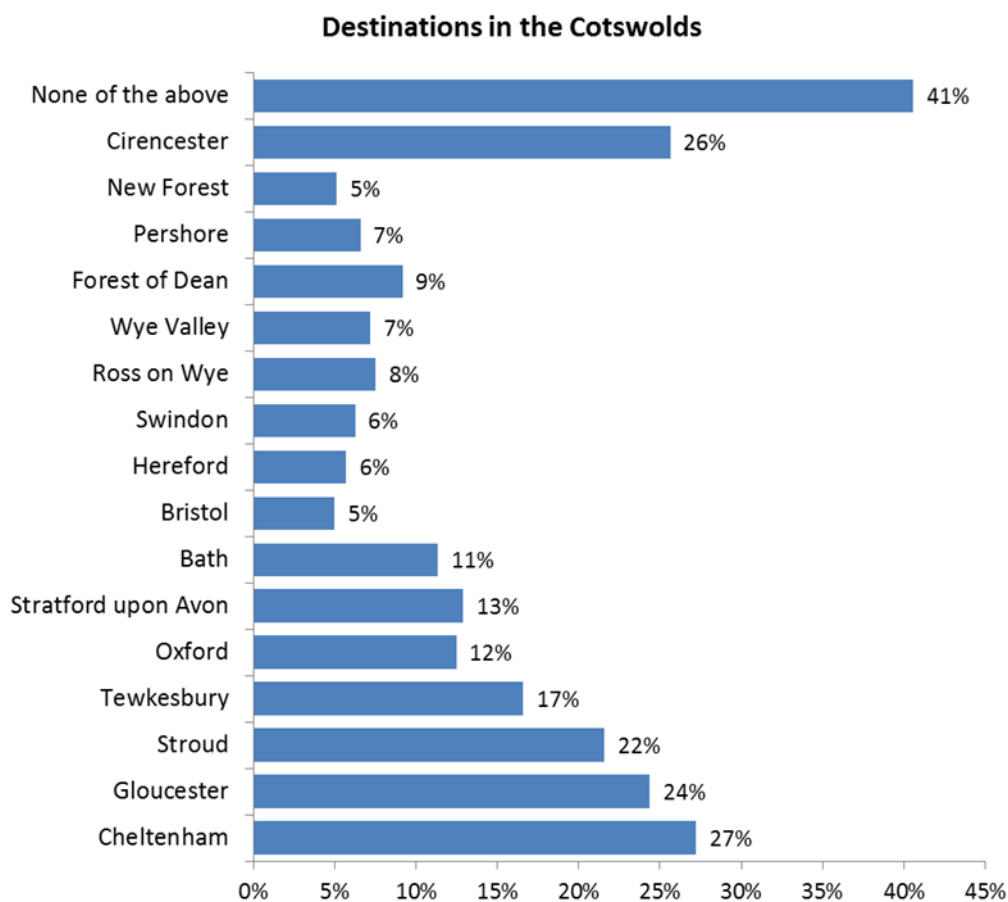
- The city is a strong draw for people staying in The Cotswolds region and further afield as a day trip
- Gloucester performs relatively weakly as a day visit destination for people based locally
- Gloucester has the potential for attracting more staying visitors if suitable accommodation was available
- Gloucester is attractive to older tourists seeking a heritage experience
- Gloucester is popular with younger people seeking a cosmopolitan experience (Arkenford, January 2012)
- The city performs relatively weakly as an attraction for visitors between 25 and 65 years old

7.3 Understanding the above it is important that any action plan for improving the visitor economy must clearly identify the target markets in terms of demographics, geography and interests, improve the offering to these and communicate this in the best ways possible. This will of necessity require different approaches to different markets, however key to this will be building on Gloucester's key assets including Gloucester Rugby Club and top visitor attractions in terms of visits – Cathedral (365,000) and Gloucester Quays (4 million). Additionally as evidence shows that events through the city are key to driving visitor numbers, **a keen eye must be kept on continued improvement on delivery of current events and the development of others to increase visitor numbers.**

8. Relationship with Cotswolds Tourism Body

One area that is of importance is capitalising on the relationship with the Cotswolds brand. This has value as 20 percent of people questioned said they would not consider visiting Gloucester whilst only 9 percent would not consider visiting The Cotswolds. (Arkenford, January 2012)

Only 24 percent of those questioned (Arkenford, January 2012) viewed Gloucester as being in the Cotswolds, however this still places Gloucester in the top three regional towns/cities considered by respondents to be in the Cotswolds. Gloucester does very well at being perceived as a destination worth visiting by day visitors staying in the Cotswolds see below.



As The Cotswolds is one of the top Visit England “Attract” brands with wide International recognition it is important that Gloucester is perceived by international visitors to be one of the “must see” locations when visiting the Cotswolds. A strong representation on the Cotswolds Tourism Body is essential to ensure that this happens.

9. Current Promotion of the City

Currently the City is promoted through a number of channels:

- Private sector organisations and other attractions
- Gloucester City Council - Economic Development, Marketing Communication, Attractions/Venues
- Marketing Gloucester Ltd Promotions
- Tourist Information Centre

The following is a brief outline of what Marketing Gloucester and Gloucester City Council bodies currently do to promote the city, an assessment of how effective it is and what we should be doing to develop it.

9.1 Marketing Gloucester Ltd

Marketing Gloucester is the lead organisation uniting businesses and city partners to promote Gloucester locally, nationally and internationally as a great place to live, work and visit. Core activities are Destination Marketing, Tourism Services and Events.

The Believe in Gloucester (BiG) campaign was launched in 2012 to overcome negative perceptions and encourage local residents to take pride in their city. Since then, a number of events have featured BiG branding including BiG Eat Week and the Believe in Gloucester Awards.

Marketing Gloucester work with the Cotswolds Tourism Partnership to promote the Cotswolds region nationally and internationally as it is one of the Visit England 'Attract' brands. Activities include production of a Visit Cotswolds A4 printed guide and other literature, plus the Cotswolds.com website and microsites in Japanese and Chinese. Resources to promote the region are limited in comparison to other areas such as Yorkshire, which has sufficient budget to spend money on TV advertising campaigns.

Marketing Gloucester run several low cost marketing promotions throughout the year, in conjunction with local businesses, to drive footfall into the city. A new durable Residents' Card has been launched to encourage people to spend money locally taking advantage of special offers and incentives running during Residents' Weekend, BiG Eat Week and Independents' Weekend.

Residents' Weekend in March 2014 included over 100 exclusive offers for Residents' Card holders. The event proved to be a great success with retailers reporting increased takings and warm sunshine helping to bring more people into the city centre. At The Eastgate Centre there were 11,000 more visitors on the Saturday compared to the previous week which was a 40% increase week on week or 19% year on year. The Tourist Information Centre received nearly 4000 visitors in the week leading up to Residents' Weekend and the Residents' Weekend page on the website received over 3000 views. In addition, the social media campaign on Facebook achieved a total reach of 24,642.

As events attract significant numbers of tourists, Marketing Gloucester, organise several major festivals including the Gloucester Tall Ships Festival, Gloucester History Festival and the annual Christmas Lantern Procession. In addition, Marketing Gloucester produce a Summer in Gloucester leaflet and a Christmas in Gloucester leaflet to promote events throughout the city.

Marketing Gloucester support the Tourist Information Centre with production of an annual Gloucester Visitor Guide which contains comprehensive listings of accommodation, restaurants, shopping and tourist attractions. A bumper issue is planned for 2015 because of the Rugby World Cup and work is underway on a multi-lingual map booklet.

As group visitors are a key target, Marketing Gloucester normally attend one exhibition a year aimed at Group Travel Organisers to promote Gloucester - Cathedral City of The Cotswolds, in conjunction with key city partners.

The www.thecityofgloucester.co.uk website provides online visitor information and a new heritage walking tours app is being launched this summer.

Press releases are issued on a regular basis to raise the profile of Gloucester locally and nationally using the perceived impartiality of the press, and strong partnerships exist with key contacts in the local media. Budgets are limited, and so use of social media has been increasingly important in raising awareness of Gloucester news and events.

9.2 Tourist Information Centre

Gloucester Tourist Information Centre (TIC) is run by Gloucester City Council and is the central point for providing visitor information. The TIC has an array of leaflets promoting both the city and the county and provides a fulfilment service for those requesting a brochure of Gloucester either through the www.thecityofgloucester.co.uk website, by phone or by those emailing the TIC directly.

The centre currently welcomes 130,000 visitors through its doors every year, an impressive increase of 95% in the last 5 years. The TIC have been able to manage this significant increase in visitors without expanding its staff base, a testament to the dedication and hard work of the centre's staff.

The TIC has become an integral transport hub within the city, providing bookings for both National Express and Stagecoach as well as booking local day trips in addition to providing a range of public transport timetables. The service is highly regarded by visitors and locals alike and is extremely well supported by the Council.

The TIC has become a successful and established ticketing venue within Gloucester, seeing event organisers repeatedly returning for support with selling their event tickets. Organisers can utilise a ticket agent service that is on offer, allowing them to use the TIC as a central base to promote and sell their events. The TIC has also established itself as the main ticket agent for the Gloucester History Festival which incorporates the national Heritage Open Days, organised in partnership with

Marketing Gloucester, Gloucester Civic Trust and the local MP. Furthermore, the TIC offers advance entry tickets to many of Gloucester attractions, with the aim of encouraging visitors to stay longer in the city and boosting the local economy, these include the city Museum, Folk Museum, Soldiers of Gloucestershire Museum and Nature on Art.

The TIC is the main souvenir shop in Gloucester that provides a range of publications and souvenirs, including locally sourced products. The service is constantly addressing its offer, gathering feedback and listening to the views of its users to evolve and adapting in line with customer needs and requirements.

The TIC attends various city centre events to provide real time visitor information. Attendance includes the Tall Ships Festival at Gloucester Docks, the Flower Festival at Gloucester Cathedral, various summer events in Gloucester Park and has previously attended the Victorian Christmas Market at Gloucester Quays.

The TIC assists Marketing Gloucester in a number of campaigns and is a central, front-facing and high impact location for Marketing Gloucester to utilise to showcase their events. The TIC acts as a ticket agent for the Tall Ships Festival by providing a venue to purchase advance wrist bands to board the tall ships.

The TIC is the main location for local residents of Gloucester to pick up their Resident's Pass which is available all year round with peaks during the lead up to Residents' Weekend, BiG Eat Week and Independents' Weekend.

The service offers an education outreach programme providing vital tourism education to local schools and community groups.

The TIC is recognised as the best TIC in England following the Visit England Excellence Awards 2014. Previous to this, the TIC won 5 consecutive awards, either gold or silver at the South West Tourism Awards and a gold Cotswold Tourism Award in 2013.

The TIC manages the Gloucester Coach Meet and Greet Scheme, which was implemented in November 2013 following a successful bid to the High Street Renewal Fund. Passengers are warmly greeted upon arrival and guided from the coach park into the city centre, providing information about the city and answering any questions the visitors may have along the way. Providing the personal touch is welcomed from many coach companies and visitors to the city.

10. Action Plan

The visitor economy already makes a significant contribution to the local economy and if the current successes can be built on, this can become even more important and act as a catalyst for funding for further improvements to the City.

There are key areas that need to be addressed by the partners looking to maximise that growth over the next 15 years these include:

- Improving the quality of the visitor experience
- Increasing the accommodation in the City by another 1800 rooms
- Promoting the city

Listed below are the key areas which require action in order to maximise the increase in value to the visitor economy to Gloucester. These cannot be achieved by any one body, but by agreeing priorities and working in partnership. It is important to note that the **actions listed are at a strategic level only and do not represent a detailed or confirmed plan. If the actions listed below are agreed upon by stakeholders then a subsequent document will be produced with operational plans highlighting ownership of actions, timescales, budgets , roadmaps and so-on.**

10.1

Subject	Issue	Proposed Action
Accommodation	There is considered to be a lack of hotels rooms in Gloucester and a lack of 4/5 star hotels in the city centre	Commission and promote research to investors showing the demand led opportunity that Gloucester provides Marketing Gloucester work with Economic Development to produce evidence that Gloucester will support more Hotels and then present this to investors and developers Partnership with hotels in the wider area Work with AIR BnB, Holiday Lettings to Increase local providers – roadshows etc

10.2

Subject	Issue	Proposed Action
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City Branding	There are many different logos being used by City organisations, it would be ideal to reduce the number and increase the quality. Additionally the city as a whole has not developed a theme colour/style palette for city dressing and furniture	Form working group with Marketing Gloucester, Gloucester City Council Marketing Communications, Civic Trust etc. to develop uniform branding. Produce brand bible for city organisations – see Gloucester Diocese for example. Competition through press/radio to produce new city branding Survey of local people as to whether they prefer contemporary or traditional branding styles
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10.3

Subject

Issue

Proposed Action

Tourist Information

Provided by TIC and Marketing Gloucester there is a need to relocate the present TIC services and improve the offering and data collection

MGL work with TIC on new TIC location to ensure best practice. Co-locate Marketing Gloucester and TIC in the same building possibly with Economic Development to enable better coordination of activities. Production of a plan for the development of world class infrastructure to complement the world class TIC team. Consideration must be made of investment in data collection, multimedia and retail requirements. Because the TIC is the first contact point for many visitors to Gloucester it is crucial that we make a good impression. It is believed that revenue from the TIC could be substantially increased by further development of the commercial model.

10.4

Subject

Issue

Proposed Action

Marketing

Profile needs to be raised of the city nationally and internationally but with minimal above the line budgets

Improve content, functionality and graphics of www.thecityofgloucester.co.uk

PR – Maximise coverage in international, national, regional media

Seek additional funding from EU/Cotswolds Tourism for above the line promotion

Exhibit at events aimed at tour operators promoting Gloucester as a great destination

Speed dating for tour operators/Familiarisation trip

Continue efforts to maximise value of Digital media, social media, tripadvisor

Promotional campaign on Aethelflaed to gain national PR coverage

Regular promotion of anniversaries of Gloucester people and events

10.5

Subject

Issue

Proposed Action

Rugby World Cup

Huge opportunity for the city but no additional funding for promotion of the city. Additional funding is assigned to Fanzone, city dressing and event logistic support.

Marketing Gloucester in conjunction with Gloucester City Council will make best use of PR and social media within current budgets and look to achieve sponsorship to enable additional promotion and events.

10.6

Subject

Issue

Proposed Action

Cultural Identity

Sometimes negative perception of Gloucester by locals

Use Believe in Gloucester Campaign through initiatives such as BiG awards, BiG Residents' Card and so-on

Youth BiG campaign/Youth Ambassador Working with Young Gloucester, CofE, local religious and VCS, Local Schools, RC, Jamie McDonald , launch local heroes card for youth and develop youth engagement programme

Taxi drivers and service employees can be disparaging about their own city

Improve knowledge of service workers about what else the city has to offer
Ambassador schemes linked in with an award to incentivise

10.7

Subject

Issue

Proposed Action

City Dressing

In part the city is “tired” and empty shops create an unattractive ambience

Explore options and implement a series of city dressing initiatives including, hanging baskets, flags, banners

10.8

Subject

Issue

Proposed Action

Signage

Unattractive “gateways” into the city

Improve and regularise signage indicating city entry. Achieve sponsorship for roundabouts so that they can be improved. Increase and improve signage.

Find commercial funding for digital information boards

10.9

Subject

Issue

Proposed Action

Cotswolds Tourism

Engagement has been sporadic and representation in promotional material has been diminished. Association of Gloucester with Cotswolds brand is important – particularly for International markets and day visitors staying in rural areas and other Cotswold Tourism area towns.

Ensure that for International consumption Gloucester is strongly represented as the Cathedral City of the Cotswolds and Heritage City of the Cotswolds – both true statements. Ensure that Gloucester gets a proportional amount of any funding gained for the Cotswolds Tourism Partnership based on its impact on the tourist economy.

10.10

Subject

Issue

Proposed Action

Events

While shown to be essential to the local economy historically not all events in the city have been well coordinated leading to conflicts of timing and poor

Continue to improve delivery and promotion of current events. Ensure that as many events organisers in the city as possible are utilising the coordinated calendar of events

quality. Additionally some events have the potential to be grown to have far more impact on visitor numbers and spend. The significant events: Tall Ships, Three Choirs, Crucible are not annual, leading to “dead” years. Particularly May bank holiday. This is a missed opportunity

Work to develop “Fringe” festivals for “Three Choirs” and “Crucible” and “Tall Ships”

Look for additional self-funding large popular events to fill “dead” years

Publish the three year events calendar currently used for internal consumption to enable tour operators and visitors to plan visits.

Develop events and promotions around anniversaries similar to the model for Richard III for Aethelflaed amongst others including Henry III, and the Siege of Gloucester

10.11

Subject

Issue

Proposed Action

Car parking

Car parking costs can have an elastic effect on footfall

Discuss with Gloucester Quays the possibility of introducing a parking scheme(s) at Quays/Eastgate Centre and in City centre similar to that offered by Swindon Outlet Centre, or by Worcester Asda i.e. parking fees redeemable upon achieving a certain level of spend. In Gloucester City car parks this could be redeemed on following visit with one time Parking Scratch card

Promote changed times of free parking to support evening and Sunday economy

10.12

Subject

Issue

Proposed Action

City attractions

Not enough cooperation and coordination between City Attractions

Combine disparate groups such as Hotels and Attractions and Quays Marketing to form a city wide single Tourism Partners Group for the city to meet quarterly including: TIC, Marketing Gloucester, Hotels, members of other attractions and Museums, and tourism businesses. To be held at different premier locations

10.13

Subject	Issue	Proposed Action
Advertising and Promotion	Lack of funding for tourism compared to other comparable destinations means that marketing Gloucester don't have the budget for national advertising, videos or distribution of Gloucester Visitor Guide internationally etc. Winchester has a population of 116,000 people compared to 150,000 in Gloucester. Visit Winchester spend £70,000 pa on their marketing of which £8000 was spent on producing 3 videos recently. MGL has spent approximately £42,000 on Destination Marketing and Tourism Services the last financial year.	Increase private sector funding by approaching large businesses in the area. Try and tap into other sources of public sector funding. Link with Cotswolds Tourism and Visit England to enable Gloucester to “piggy back” on coop marketing initiatives

10.14

Subject	Issue	Proposed Action
Restaurants	Lack of quality independent restaurants and wine bars in city centre	Approach restaurants in neighbouring towns and offer financial incentives to open a restaurant in Gloucester
	Inconsistent Customer Service Standards	Use Rugby World Cup as a catalyst to enrol companies in service sector on free training workshops. See Liverpool Capital of Culture. Aim for World Host City status http://www.worldhost.uk.com/become_destination

10.15

Subject	Issue	Proposed Action
Culture and Arts	Gloucester is perceived by the Arts Council as being a cultural “black spot”. Cultural offerings are huge drivers for tourism,	Form a voluntary creative hub, utilising the best of local and national talent with experience of raising funding from the Arts Council and elsewhere to act as catalyst

can act as a stimulus for economic growth and build civic pride. The city has opportunities to claim potentially millions of pounds of Arts Council funding.

and drivers for growth in this sector in Gloucester

Update and develop cultural strategy and produce roadmap towards achieving £5 million capital funding within a scheduled timescale

10.16

Subject

Issue

Proposed Action

Perceptions of Safety in the Evening Economy

Gloucester's night time safety has vastly improved but PR has not kept up. More good news should be issued to improve perceptions.

Best Bar None Awards - very easy to administer. Press surrounding awards will make for good PR

Purple Flag Scheme - promote a safe and vibrant evening economy
Marketing Gloucester to look at more evening events/festivals. Provide an incentive for businesses to stay open in the evening and benefit from additional footfall

10.17

Subject

Issue

Proposed Action

Linkages between the Historic Docks and the City Centre

Signposting and linkages between the Quays, Historic Docks and the City Centre need to be improved.

Using Apps, city dressing, traditional and new electronic signage, funded by sponsorship aim to close the gap between the "two city centres" and unify into one experience. One board centrally placed near the Quays may also be valuable to driving visitors from Quays into the Historic City Centre.

Ensure that events bridge Quays and Historic city centre

Produce collateral that covers both in a unified way

Support efforts for regeneration of the gaps such as between Prison and

Blackfriars and development of the waterside

Support efforts to build iconic mixed use venue at Southgate carpark

10.18

Subject

Issue

Proposed Action

Maximise Visitor Spend

Launch Visitors card/City Pass similar to Big Residents' card examine York's model and see how it could apply to Gloucester, TIC to investigate Marketing Gloucester to implement.

10.19

Subject

Issue

Proposed Action

Venue

Lack of suitably sized venues to run commercially viable events and exhibitions

Investigate opportunities with commercial partners, LA and Arts Council for funding to create the much needed multiuse space in the city

10.20

Subject

Issue

Proposed Action

Hotel Rooms

Lack of quality hotels in the city centre barrier to growth

Publicise current research to investors and hotel owners and actively pursue potential investors in new hotels. Work with City Council to identify key sites for Hotel development and produce document in electronic form for distribution.

Conclusion - Tourism's Potential For Growth

The tourism industry has the potential to become one of the fastest growing sectors of our local economy. But creating – and sustaining – these higher rates of wealth and job creation won't just happen automatically, it will need plenty of hard work and entrepreneurialism from the sector itself, and help from local and national Government to remove the structural problems and blockages which might slow the industry down. By working hard to coordinate efforts and in partnership with the private sector there is a real opportunity to make Gloucester the premier visitor attraction in the region.